

011 - CLERK OF THE BOARD

Operational Summary

Mission:

The Mission of the Clerk of the Board of Supervisors is to provide the County and its citizens professional and courteous service; easy access to information; and guidance through the process to facilitate open participation in the decision and policy making of Orange County government.

Strategic Goals:

- Facilitate the decision and policy making of Orange County government by providing our stakeholders with timely and accurate information and guidance through the process.
- Ensure timely resolution of assessment appeals and promote public understanding of the process.
- Facilitate understanding and enhance the delivery of our services by promoting personal and professional growth and valuing our staff.

Key Outcome Measures:

Performance Measure	FY 99-00 Results	FY 00-01 Target	How are we doing?
PERCENT OF ASSESSMENT APPEAL CLAIMS DECIDED OR WAIVED WITHIN 2 YEAR DEADLINE. What: Indicator of success managing caseload to ensure required actions are taken before legal deadline. Why: Applicant automatically wins appeals not decided or waived within statutory 2 year deadline.	97% of 1996 and 1997 appeals have been resolved or waived. Cases under litigation included in unresolved.	Target is to attain 100%, excluding cases in litigation.	Through 3/31/00, 94% of 1998 and 15% of 1999 cases have been resolved or received a waiver.
RESULTS OF CUSTOMER SATISFACTION SURVEYS. What: Measurement of success in meeting clients' needs. Why: As service dept, meeting client needs is second only to legal mandates.	Assessment Appeal Hearing ratings all good or better.	100% rating of services as good or better. 100% rating of Community Outreach as mostly or very useful.	100% of respondents satisfied or very satisfied with service. 89% rated community outreach very useful and 11% mostly useful.
NUMBER AND PERCENT OF ASSESSMENT APPEAL INITIAL HEARINGS SCHEDULED WITHIN ONE YEAR OF FILING. What: Indicator of efficiency in processing and scheduling appeals. Why: Timely resolution of appeals is beneficial to all parties.	48% of 1996 (15,701), 67% of 1997 (16,136) and 82% of 1998 (7,201) initial hearings were scheduled within one year.	100% scheduled within one year.	As of 3/31/00, 66% of the initial hearings have been held or are scheduled for 1999 appeals.

At a Glance:

Total FY 1999-00 Actual Expenditure + Encumbrance:	2,033,637
Total Final FY 2000-01 Budget:	1,969,991
Percent of County General Fund:	0.10%
Total Employees:	32.00

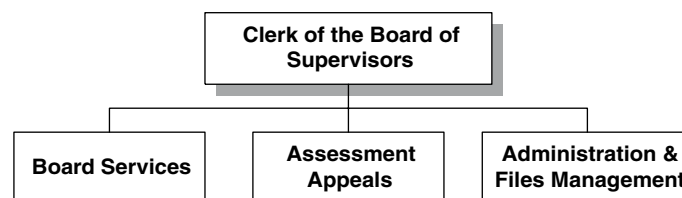
Key Outcome Measures: (Continued)

Performance Measure	FY 99-00 Results	FY 00-01 Target	How are we doing?
CHANGES/CORRECTIONS TO BOARD OF SUPERVISORS AGENDA AFTER DISTRIBUTION. What: Measurement of Clerk of the Board's accuracy and training. Why: To provide accurate information in a timely manner and to meet Brown Act noticing requirements.	April to December 1999, Clerk of the Board's error rate was 1.2%.	To reduce Clerk of the Board error rate to 1%.	January to March, 2000 Clerk of the Board's error rate was 1.2%.
PERCENT OF ACCURATELY COMPLETED AND TIMELY FILED ASSESSMENT APPEAL APPLICATIONS. What: Indicator of taxpayers' and agents' understanding of process. Why: Instructions on completing applications and deadlines should be accessible and easily understood.	72.5% of 1998 applications were completed accurately and filed timely.	75% of applications accurately completed and filed on time.	In 1999, 83% of applications were completed accurately and filed timely.

Fiscal Year 1999-00 Key Project Accomplishments:

- Completed implementation of Legislative Action Storage and Retrieval System.
- "Opinion on Line" added to website to allow public input to Board of Supervisors (BOS) on agenda items.
- Enhanced website to include information on Boards, Committees, and Commissions; Assessment Appeal Board Members and their qualifications; and access to Codified Ordinances.
- Received 1999 CSAC Challenge Award for the Boards, Committees and Commissions database.
- Enhanced Assessment Appeal Community Outreach efforts by notifying applicants of workshop in their area on "How to Prepare for Your Hearing".
- Developed brochure on "How to Address the Board of Supervisors".
- Streamlined the Orange County Conflict of Interest filing process.
- Implemented cost-savings measures such as preparation and mailing of assessment appeals notices from the Data Center, automation of assessment appeals worksheet and email distribution of BOS agendas and minutes.

Organizational Summary



COB - EXECUTIVE - Provides leadership and vision, management oversight and direction to all COB functions; performs administrative functions including budget preparation and monitoring, strategic financial projections, human resources, legislative analysis, prepares business plan and monitors progress in meeting goals and performance indicators.

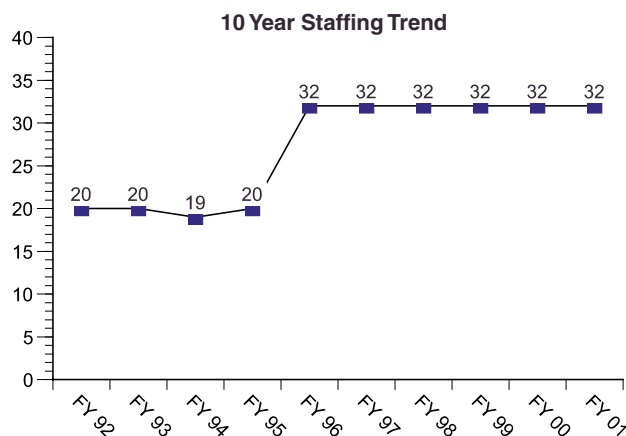
BOARD SERVICES - Prepares and publishes agendas for Board of Supervisors and other authorities in accordance with legal requirements for public meetings; records and publishes actions taken by the Board; maintains official rosters of Boards, Committees and Commissions; processes legal publications, postings and notices; receives and admin-

isters bid openings for County projects; administers oaths of office for various elected and appointed officials and employees; serves as filing officer for Statement of Economic Interest forms; receives and processes claims, summons and complaints against the County.

ASSESSMENT APPEALS - Receives and processes assessment appeal applications; schedules hearings in accordance with legal requirements; prepares minutes and processes actions of the Appeals Boards and hearing Officers; provides assistance and education on the assessment appeals process to the general public and professional groups through workshops, brochures and the Internet.

ADMINISTRATION/FILES MGT - Provides files management for all records that the Clerk of the Board is required to maintain; assists County staff and the public with research and retrieval of information; provides technical knowledge and coordination in development and implementation of automation projects; provides end-user system support services; performs purchasing and petty cash functions for COB and the Board of Supervisors Offices.

Ten Year Staffing Trend:



Final Budget and History:

Sources and Uses	FY 1998-99 Actual Exp/Rev ⁽¹⁾	FY 1999-00 Final Budget	FY 1999-00 Actual Exp/Rev ⁽¹⁾	FY 2000-01 Final Budget	Change from FY 99-00 Actual	
					Amount	Percent
Total Positions	N/A	32	N/A	32	32	N/A
Total Revenues	8,634	16,000	459,364	5,500	(453,864)	-98.80
Total Requirements	1,903,895	1,914,721	1,832,470	1,969,991	137,521	7.50
Net County Cost	1,895,261	1,898,721	1,373,106	1,964,491	591,385	43.07

(1) Amounts include prior year expenditures and exclude current year encumbrances. Therefore, the totals listed above may not match Total FY 1999-00 Actual Expenditure + Encumbrance included in the "At a Glance" section.

Ten Year Staffing Trend Highlights:

- Increase to staffing in FY 95-96 due to transfer of assessment appeals intake function from the Assessor. COB has been able to maintain level staffing since that time, largely due to automation of previously labor-intensive activities.

Budget Summary

Plan for Support of the County's Strategic Priorities:

Requested FY 00-01 budget is slightly less than forecasted in the Strategic Financial Plan.

Requested FY 00-01 budget is consistent with and represents the resources anticipated to accomplish 2000 Business Plan goals.

COB will continue to pursue automation where efficient and cost-effective.

Changes Included in the Recommended Base Budget:

Due to significant increase in automation and resulting system support needs, a Board Services Specialist position will be exchanged for an Information System Technician.

Detailed budget by expense category and by activity is presented for agency: CLERK OF THE BOARD in the Appendix on page 485.

Highlights of Key Trends:

- After record high assessment appeal filings for 1993-1997, the workload has returned to a manageable level for 1998-1999.
- COB will continue to pursue automation to improve efficiencies and client-service.
- COB will continue to enhance information available on its website.

Budget Units Under Agency Control

No.	Agency Name	Cob - Executive	Board Services	Assessment Appeals	Administration/Files Mgt	Total
011	Clerk Of The Board	233,674	464,213	831,255	440,849	1,969,991
	Total	233,674	464,213	831,255	440,849	1,969,991